

# HR Dashboard (ICT4NGO) Functional Requirements

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## INTRODUCTION

The HR Dashboard (HRD) is a human resources management toolbox which focuses on guiding and providing pathways for NGO staff digital skills development. The HRD's standards of self-evaluation and self-learning for NGO staff were derived from the ICT4NGO project.

In addition to human resources departments, other adults who volunteer, support or work for NGOs, will be able to evaluate their skills, competences and knowledge.

This document focuses on setting the general requirements and developing a minimum viable product of the HRD. It also indicates some possible directions of its future development.

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## GLOSSARY

- **ICT4NGO** - platform available on [www.ict4ngo.org](http://www.ict4ngo.org)
- **DAT** - Digital Assessment Tool
- **HRD** - HR Dashboard
- **Super Admin** - TechSoup admin of [www.ict4ngo.org](http://www.ict4ngo.org) who can manage all country instances
- **Local Admin** - TechSoup local instance (language) admin who can manage only his instance
- **Questionnaire** - questionnaire (testing digital skills) from 1 of 5 categories of ICT4NGO platform
- **NGO affiliation** - situation when registered user using TechSoup credentials (for login on Partner Platforms, *example: techsoup.sk*) has chosen the NGO he represents and receives confirmation that he is assigned to this particular NGO as a Member
- **User** - standard user of the ICT4NGO platform
- **Organizational Registrant** - user registered with TS donation program credentials
- **HR role (HR User)** - optional role that a registered user can have to gain more insights on HR management within his organization
- **[view]** - additional explanation on how the process looks like from the particular user's view or system operations

## GENERAL REQUIREMENTS

1. The HRD is connected to and/or is an integral part of the ICT4NGO platform.
2. The HRD is available in multiple languages, with English (UK platform) as the main language.

## MINIMUM VIABLE PRODUCT (MVP)

1. The ICT4NGO user (Organizational Registrant) with active NGO affiliation (user connected to the particular NGO within the ICT4NGO platform) **can turn on the HR role on his profile**
2. The ICT4NGO user with an active NGO affiliation with an active HR role can **enable or disable** HR roles (max. 4 HR roles in one organization) **among already existing ICT4NGO users with an active NGO affiliation**
3. **ICT4NGO user with an active NGO affiliation with an active HR role can send an invitation to another 3 individuals** from his organization to register on the ICT4NGO platform **with the “HR role” already enabled**
  - a. [Local Admin] CMS from the Local Admin level of country instance allows for editing (WYSWIG editor)
    - i. **Invitation Panel content**
    - ii. **HR role invitation message template (first message)**
    - iii. **HR role status change message (another message)**
  - b. [Super Admin] CMS from the Super Admin level allows for editing (WYSWIG editor)
    - i. **Invitation Panel content**
    - ii. **HR role invitation message template (first message)**
    - iii. **HR role status change message (another message)**
  - c. [HR role] HR role can enter a menu called **HR Roles:**
    - i. See the list of all users divided into two tabs (categories) allowing to search and show users per each data (per Name, Function etc)
      1. HR roles with **Name, Surname, E-mail, Function, Active/Inactive HR role** (green vs gray circle) (table) - here the HR role can manage users' HR roles by clicking **“change role” button:**

- triggers sending the **HR role status change message (another message)**
- ii. **Invitation Menu**: Type or paste email addresses for new HR roles manually and send it: send button triggers the **HR role invitation message template (first message)**
- d. [system] Systems based on the given templates sends
  - i. **HR role invitation message template (first message)**
    1. [user] User with **inactive** status and role receives **HR role invitation message template (first message)** with a direct link to the registration form (standard ICT4NGO user registration happens)
  - ii. **HR role status change message (another message)**
    1. [user] User with an active HR role receives **HR role status change message (another message)**
- e. [Local admin] CMS allows for editing from the Local Admin level of a country instance:
  - i. **registration confirmation message template for the HR role (sender, HR role)**
  - ii. **registration confirmation message template for user (receiver)**
- f. [Super admin] CMS allows for editing from the Super Admin level:
  - i. **registration confirmation message template for the HR role**
  - ii. **registration confirmation message template for user**
- g. [HR role] Receives **registration confirmation message template for the HR role** informing that the invited user has just registered
- h. [user] Receives **registration confirmation message template for the user** that he has just registered and gained the HR role

4. The ICT4NGO user with an active NGO affiliation with an active HR role can invite new, standard users from his organization

- a. [HR role] The HR role can invite users using the **Manage** option in **Staff Management** panel in the **HR Dashboard** menu:
  - i. **Type or paste email addresses** manually or
  - ii. **Upload CSV file** with email addresses of people from his/her NGO and
  - iii. Click "send it": the send button triggers the **standard user invitation message template**

- b. [Local Admin] CMS from the Local Admin level of a country instance allows for editing (WYSIWIG editor)
    - i. **Invitation Panel content**
    - ii. **Standard user invitation message template (CTA: register)**
    - iii. **Standard user registration confirmation message template**
  - c. [Super Admin] CMS from the Super Admin level allows for editing (WYSIWIG editor)
    - i. **Invitation Panel content**
    - ii. **Standard user invitation message template (CTA: register)**
    - iii. **Standard user registration confirmation message template**
  - d. [system] Systems based on the given templates sends
    - i. **Standard user invitation message template (CTA: register)**
    - ii. **Standard user registration confirmation message template**
5. The **ICT4NGO user with an active NGO affiliation with an active HR role** can access the **HR Dashboard menu** which contains
- a. **Organization**
  - b. **Staff Management**
  - c. **Skills Check**
  - d. **Skills Check Results**
  - e. **Skills Performance**
6. The **ICT4NGO user with an active NGO affiliation with an active HR role** can access the **Organization** panel in the **HR Dashboard** menu and see the following data:
- a. Name of your organization (sync from Partner Platforms)
  - b. Registration address (street/postal code/city/country) (sync from Partner Platforms)
  - c. TechSoup program registration date (sync from Partner Platforms)
7. **ICT4NGO user without an active NGO affiliation but with an active HR role** can access the **Organization** panel in **HR Dashboard** menu and see and **change** the following data:
- a. Name of your organization (sync from Partner Platforms)
  - b. Registration address (street/postal code/city/country) (sync from Partner Platforms)



- c. TechSoup program registration date (sync from Partner Platforms)
8. The ICT4NGO user with an active NGO affiliation with an active HR role can access the **Staff Management** panel in the **HR Dashboard** menu and see the following options:
- a. **Staff overview** - view of all staff based on emails provided (pasted/uploaded) with the following data presented in the table, where each value (e.g. name, status - invited) may be filtered and sorted as the user wants:
    - i. Name, Surname, E-mail, Function, Type of Staff: Employee or Volunteer, Status: **Invited** or **Active**
  - b. **Manage**
    - i. Add - invite users to ICT4NGO
    - ii. Delete - remove users from ICT4NGO
    - iii. Search - by all existing data
    - iv. Modify - if there's an error, the HR role can modify the data of the Standard user
  - c. **Historical staff overview** - view of all staff based on emails provided (pasted/uploaded) with the following data presented in the table, where each value (e.g. name, status - invited) may be filtered and sorted as the user wants:
    - i. Name, Surname, E-mail, Function, Type of Staff: Employee or Volunteer, Status: **Inactive** (when someone leaves organization)
9. The ICT4NGO user with an active NGO affiliation with an active HR role can access the **Skills Check Results** panel in the **HR Dashboard** menu and see the following options:
- a. **Check Status:** number and percentage of questionnaires in total in this NGO visualization and comparison between 3 statuses of questionnaires:
    - i. Assigned (by HR role to users to be done)
      - 1. Main categories view
      - 2. Subcategories view
    - ii. Completed (by users)
      - 1. Main categories view
      - 2. Subcategories view
    - iii. Not completed
      - 1. Main categories view

## 2. Subcategories view

**b. Check Request: The HR role can assign standard users** to perform the questionnaire in 3 steps:

- i. Define users (add emails manually by clicking + / make a selection by filtering / add all)
- ii. Select category and/or subcategories of questionnaire
- iii. Define time to perform test (mm-dd-yyyy) and confirm
- iv. [Admin]
  1. The Admin (local/super) can prepare messaging templates for the HR User to be used through user interface (messaging system) and send an email **invitation** to perform questionnaire
  2. The Admin (local/super) can prepare messaging templates for the HR User to be used through the user interface (messaging system) and send an email **notification** to perform questionnaire (between 15 and 1 days before deadline - possibility to send a couple of notifications by choosing different sending days after the deadline)
  3. The Admin (local/super) can prepare messaging templates for the HR User to be used through the user interface (messaging system) and send an email **reminder** to perform questionnaire (after the deadline - possibility to send a couple of reminders by choosing different sending days after the deadline)
- v. [system] System can send different internal notifications (messaging system) and messages directly to the given email addresses
- vi. [HR user] can
  1. Send and edit internal notifications using the user interface (messaging system)
  2. Send email messages directly to the given email addresses for invitations, notifications, reminders
- vii. [User] can
  1. Receive internal notifications using the user interface (messaging system)
  2. Receive email messages directly to the given email addresses for invitations, notifications, reminders

10. The ICT4NGO user with an active NGO affiliation with an active HR role can access the **Skills Performance** panel in **HR Dashboard** menu and see the following data:
- a. Skills Performance in Organization
    - i. Category Results: Visualization of **overall skills results** in the organization per **category** 1-5 (column slides) – based on algorithm how strong the organization is in the particular categories; by clicking in the given category, system should show subcategories results related to the main category - possibility to save results as PDF and CSV file
    - ii. Subcategory Results: Visualization of overall skills results in the organization in particular **subcategories** (column slides) – based on an algorithm of how strong the organization is in the particular subcategory - possibility to save results as PDF and CSV file
  - b. Individuals Skills Performance
    - i. Visualization of skills per **particular person** – person to be chosen from the table of employees using filtering, sorting and search panel; the system should show the results (performance indicators) of the questionnaires taken by the person in all categories and subcategories; system should allow to “See recommendations” - possibility to save results as PDF and CSV file
    - ii. Visualization of recommendations per **particular person** – person to be chosen from the table of employees using filtering, sorting and search panel; - possibility to save results as PDF and CSV file
    - iii. Managing the recommendations implementation per **particular person**  
**- Skills Adoption and Performance**
      1. HR User
        - a. can assign and reassign recommendations
        - b. can ask Users about the progress in recommendations adoption (Messaging Panel)
      2. User
        - a. can see assigned and reassigned recommendations by Admins
        - b. can reply to Admins

## ADDITIONAL FEATURES

1. **Access Control List** table (what each role can / can't do)
2. Wireframes of the:
  1. **Skills Check Results** (Skills Check Adoption)
  2. **Skills Performance**
  3. Comparison of the results with results of other NGOs (mean, median)